Information Technology Project Management Handbook

Introduction

Information technology project management inside the State of Montana reduces risk to the state as a whole while increasing value and transparency.

IT Project Reporting

Information technology project reporting fulfills requests for information by the Legislative Fiscal Committee. The State Chief Information Officer, through the State Project Management Office, aggregates information in order to present a consistent and accurate statewide report to legislative officials. The State CIO specifies the way the reports are submitted.

Four basic reports exist:

- Project Baseline Report, at the start of a project
- Project Monthly Status Report, monthly during the project
- Project Closure Report, at the end of a project
- Post-Implementation Review, six months after a project ends

Project Baseline Report

An agency submits the Project Baseline Report when it approves of the Project Management Plan but before work has commenced. This report contains:

- Project organizational chart, including project sponsor and contractors
- Project roles and responsibilities
- Project scope statement, including a scope description, a description of how requirements will be gathered and documented, a list of project deliverables, and the user acceptance criteria
- Schedule, including start date, end date, and a milestone list with due dates
- Costs, including the cost estimate, funding sources with amounts, and a high-level estimate of post-implementation operational costs
- Change management plan
- Deliverable acceptance plan
- Communication plan
- Communication matrix
- Risk/Issue management plan
- Risk register
- Quality plan with metrics

Project Monthly Status Report

Agencies submit the Project Monthly Status Report by the 7th working day of each month. It contains:

General Project Information
- Agency
- Project Title
- Current Phase (Initiation, Planning, Development, Implementation, Close, Hold)
- Project Sponsor

LFC Report Update
- Expended money to Date
- Percentage of work completed to date
- Project health for scope, schedule, budget, risk, and overall health based on criteria described in the Project Health Status Worksheet document in the PMO website (pmo.mt.gov)
- If appropriate, provide updated data for:
  - Revised end date
  - Revised estimate
  - Appropriated budget amounts

Project Variances this Period
- Summary of approved project changes and impact on the project's scope, schedule, and cost

High-level Accomplishments for this Period
- The high-level accomplishments listed in the previous month's report and the status of each
- Any additional, significant high-level accomplishments for this period

High-level Accomplishments Planned for Next Period
- List of high-level accomplishments scheduled for the next reporting month

Project Closure Report

Agencies submit the Project Closure Report within 30 days of project closure. It contains:

Closure Report
- Same data as the Project Monthly Status Report above, excluding the "High-level Accomplishments Planned for Next Period" section
- Confirmation of project acceptance by project sponsor
- Results of customer satisfaction survey
- Outstanding issues, risks, and defects with associated actions to resolve
- Maintenance and operations plan for the information system(s), including:
  - On-going support plan, including internal and external resources
  - High level summary of follow-on projects with projected schedules, if applicable

Updated / Final information from Project Baseline Report

Post Implementation Review

Agencies submit the post-implementation report 6 months after the end of the project. It contains:

- Agency name
- Project title
- Sponsor
- Project close date
- Appropriated budget amount
- Total project development cost
- Expected ongoing annual cost
- Year the ongoing annual cost start
- Funding source(s) for ongoing cost
- List of the primary project goals
- List of key objectives, the metrics used to measure these objectives, and the final metric results
- Highlight of post-implementation issues upon project closure including start date and, if resolved, resolved date
- Any additional comments the agency might have